

## How to Use the Records Management, Storage and Archiving Services Statewide Contract

<b>Contract #:</b> FAC96	<b>Contract Duration:</b> 1/22/16 to 1/31/19
<b>MMARS #:</b> FAC96*	<b>Options to renew:</b> through 1/31/2023
<b>Contract Manager:</b> Katherine Morse -617-720-3153- <a href="mailto:katherine.morse@state.ma.us">katherine.morse@state.ma.us</a>	
<b>Last change date:</b>	3/4/2016
<b>UNSPSC:</b>	78-13-00

### Contract Summary

The contract was established in response to the notification sent by the Secretary of State's Office on July 1, 2015, regarding the status of the State Record Center being at capacity. The contract provides Records Management, Storage and Archiving Services which include, but are not limited to, the following:

- **Monthly Storage Services** - Relocate data files to be held off-site in secure storage facilities.
- **Archiving Services** - Move data files no longer being used for short or long term retention.
- **Retrievals Services** - Request data files being stored to be returned to requesting facility within an agreed upon timeframe.
- **Transportation delivery/pick-up services** - Provide transport of stored data files to and from facility.
- **Emergency delivery/pick up services** (retrieval capability 24/7-365 days) - An emergency request of data files being stored to be returned to and from requesting facility within 24 hours.
- **Scanning Services** - Convert data to digital record.
- **Destruction Services** (including but not limited to records, tapes and other media) - Secure process to destroy, including but not limited to, paper files records, tapes and other media.
- **Other Services** - Other available services as awarded and defined by the contractor.

**Consider Digital Records Storage:** This is the right time to consider digitizing your State Archive Center records instead of simply transferring them to another facility please review FAC96 for available options.

Awards have been made to ten (10) contractors and the list is available under the "Vendor List and Contract Information" section of this document.

### Benefits and Cost Savings

**Statewide Contract Covers** - An array of records management, storage and archiving services available by each awarded contractor.

**On-line Capability** - Secure online access via the Internet for the purpose of tracking current status, automated inventory, account management, managing alerts and notifications, document retrieval, billing

and reporting. Contractors who provide this capability are identified in the “Vendor List and Contract Information” section of this document.

**Competitive Pricing** – The Strategic Sourcing Services Team (SSST) has awarded the contract to those contractors who provided the most competitive pricing and/or discounts for the services being offered. Please reference the contractors attached “Rate Sheet” on COMMBUYS for pricing details.

**Prompt Pay Discount** – Is available by all contractors

**Volume Purchase Discount** – Is available from some contractors. Please reference contractors attached “Rate Sheet” on COMMBUYS for details.

**EPP** – Contractors provide services that represent environmentally preferable practices wherever possible.

## Who Can Use This Contract?

**Applicable Procurement Law:** MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00

### Eligible Entities:

01. Cities, towns, districts, counties and other political subdivisions
02. Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
03. Independent public authorities, commissions and quasi-public agencies
04. Local public libraries, public school districts and charter schools;
05. Public Hospitals, owned by the Commonwealth;
06. Public institutions of high education
07. Public purchasing cooperatives;
08. Non-profit, UFR-certified organizations that are doing business with the Commonwealth;
09. Other states and territories with no prior approval by the State Purchasing Agent required; and
10. Other entities when designated in writing by the State Purchasing Agent.

## Pricing and Purchase Options

**Purchase Options:** Purchases made through this contract will be made on a fee for service basis. Eligible Entities may purchase storage containers and packaging outright in cases where they are not provided as part of the service.

**Pricing and Buying Details:** All contract pricing and/or discounts listed MUST remain firm through 1/31/19 for all listed Contractors. Contractors’ awarded pricing is for specific services. All pricing on this contract is “ceiling” or “not-to-exceed” pricing. Eligible Entities have the right to issue requests for quote or negotiate with contractors in order to enhance the value of the contract.

**Statewide Awards:** All Contractors provide services statewide.

**Quotes:** Departments are required to solicit at least three (3) quotes from contractors listed to determine which contractor can provide the best value for the services being purchased. All that is required is that departments contact the three (3) contractors for quotes; you are not required to receive responses from all three (3) contacted contractors.

To assist in this process a “Statement of Work” (SOW) template is available on COMMBUYS under each contractors PO. Please complete the SOW providing specific details of services needed and send a SOW request for quotes to three (3) contractors to obtain the best value pricing.

## Additional Information

Important information has been highlighted below. Additional information is available in COMMBUYS under each contractors PO as an attachment entitled “Specifications and Requirements”. This attachment provides additional specifications and requirements that user departments should reference when developing their Statement of Work (SOW).

### Executive Order EO504

Contractors of the FAC96 Records Management, Storage and Archiving Services have agreed to comply with Executive Order EO504 Regarding the Security and Confidentiality of Personal Information, please reference link for details: <http://www.mass.gov/ocabr/docs/idtheft/eo504.pdf>.

### Retention Schedule

*Contractors* must be aware that the Commonwealth’s public entities are required to retain public records for specified durations; these durations may vary depending on the content and type of record, under the guidance of the Office of the Secretary of State and the Records Conservation Board.

The Massachusetts Statewide Retention Schedule, published by the Secretary of the Commonwealth, is produced under the statutory provisions of Massachusetts General Laws Ch. 4, § 7(26), c. 30 §42, and c. 66, §§ 1, 8 and 9. This schedule applies to all records of state government including those of executive departments, constitutional offices, authorities, independent agencies, and state records being managed by contracted service providers. Further, this schedule applies to all records, regardless of location and form. This schedule does not apply to municipal government records.

**With limited exceptions, Approval of the Records Conservation Board is required before any records may be destroyed or transferred.**

For further information please refer to the Massachusetts Statewide Record Management Division at the Secretary of State which includes the link to the Record Retention Schedule.  
<http://www.sec.state.ma.us/arc/arcmu/rmuidx.htm>

### Security Deposit or Additional Insurance

Contractors may not charge an Eligible Entity a security deposit or additional insurance for any commodity or service under this Statewide Contract. If an insurance policy does expire during the life of the Contract, a renewal certificate must be sent to the eligible entity fifteen (15) days prior to the expiration date.

## Conditions for Storage/Archiving Services

All records are to be stored in such a manner that all reasonable steps are taken for the protection/security of said records from extreme heat and cold, high humidity, physical damage or unauthorized removal, including procedures for adequate fire detection and extinguishing systems, protection against water and smoke damage, watertight facilities, alarm systems, safes and locked files, window bars, security guards or any other devices reasonably expected to prevent loss through larceny or other means of unauthorized removal for manually held records.

## Loss/Destruction

Contractors are responsible for all files stored and/or archived in their facilities from unauthorized use, theft and loss or damage by fire, smoke and water.

## Contract Transition

The Contractor shall be responsible to coordinate with any outgoing vendor, as applicable, and shall move all records, files and boxes, as may be necessary, to implement the services of this contract, at no charge to the user Departments beyond those costs itemized in the price sheet submitted with the bidder's bid package. The Contractor will assume any and all expenses that may arise to move all records, files and boxes as specified in the contract between the successful bidder and the Department. The Contractor shall coordinate with any outgoing vendor a timeframe and schedule for a records storage transition. The schedule must be approved by the Department.

In the event of early contract termination and for future contract transition, the Contractor shall work with user department and any new Contractor to ensure a seamless transfer of records at a cost consistent with the price sheet on file with the Contractor's bid. The Contractor may not impose any additional expenses or charges to the department in anticipation of or as a hedge against any future contract transition.

## Order Cancellations

User department(s) and/or contractor(s) must provide at a minimum at least 48 hours cancellation notice of any services being purchased under the awarded contract.

## Full Performance Specifications and Requirements

The "Specification and Requirements" provides detailed specifications and performance requirements that each contractor must comply with under this statewide contract. Department should reference this document to ensure compliance by the contractor. Every awarded contractor has the "Specifications and Requirements" attachment located on COMMBUYS <https://www.commbuys.com/bsol> under their PO.

## Vendor List and Contract Information

*The available contractors are listed below. Please refer to each vendor's COMMBUYS PO for award information. Award information attachments are available for each vendor PO under the Agency and Vendor attachment sections of COMMBUYS.*

<u>Contract/Blankets PO #</u> <i>By clicking on the vendors PO number this should bring you directly to their COMMBUYS page.</i>	<u>Vendor Name</u>	<u>Contract Manager</u> <i>Name, Phone, Email</i>	<u>MMARS Vendor Code</u>	<u>MMARS Vendor Line</u>
<a href="#">PO-16-1080-OSD03-SRC02-00000006684</a>	<b>A WALECKA &amp; SON INC</b>  <b>Prompt Pay Discount:</b> 2% 10 days, 1.5% 15 days, 1% 20 days	Thomas Muldoon 508-295-7713 <a href="mailto:tomm@awalecka.com">tomm@awalecka.com</a>	VC6000160164	1
<a href="#">PO-16-1080-OSD03-SRC02-00000006680</a>	<b>APEX INFORMATION SECURITY INC.</b>  <b>Prompt Pay Discount:</b> 3%-10 days, 2% 15 days, 1%-20 days <b>On Line Capability:</b> yes	Bill Rizos 978-275-0006 <a href="mailto:wrizos@apexinfosecurity.com">wrizos@apexinfosecurity.com</a>	VC0000402655	2
<a href="#">PO-16-1080-OSD03-SRC02-00000006683</a>	<b>INFOSHRED LLC</b>  <b>Prompt Pay Discount:</b> 3% 10 days, 2% 15 days, 1% 20 days, ½% 30 days <b>On Line Capability:</b> yes	Stacey DiPiazza 860-627-5800 <a href="mailto:sdipiazza@infoshred.com">sdipiazza@infoshred.com</a>	VC6000201079	3
<a href="#">PO-16-1080-OSD03-SRC02-00000006677</a>	<b>IRON MOUNTAIN INC</b>  <b>Prompt Pay Discount:</b> 2% 15 days <b>On Line Capability:</b> yes	Bill Silvio 781- 879-0830 <a href="mailto:William.Silvio@ironmountain.com">William.Silvio@ironmountain.com</a>	VC0000190561	4
<a href="#">PO-16-1080-OSD03-SRC02-00000006681</a>	<b>RECORDKEEPER ARCHIVES CTRS LTD</b>  <b>Prompt Pay Discount:</b> .02% 10 days <b>On Line Capability:</b> yes	William F Walsh 508-588-1919 <a href="mailto:bill@recordkeeperrms.com">bill@recordkeeperrms.com</a>	VC6000167161	5
<a href="#">PO-16-1080-OSD03-SRC02-00000006678</a>	<b>RETRIEVEX HOLDINGS CORP/Access Information Management</b>  <b>Prompt Pay Discount:</b> 1%-10 days, .75% 15 days, .50%-20 days <b>On Line Capability:</b> yes	Jean Mackie 978-854-6220 x3400 <a href="mailto:boston@accesscorp.com">boston@accesscorp.com</a>	VC0000393172	6
<a href="#">PO-16-1080-OSD03-SRC02-00000006685</a>	<b>RICOH AMERICAS CORPORATION</b>  <b>Prompt Pay Discount:</b> 1% - 20 days	Mike Pallotta 978-621-1276 <a href="mailto:Mike.Pallotta@Ricoh-USA.com">Mike.Pallotta@Ricoh-USA.com</a>	VC6000227409	7
<a href="#">PO-16-1080-OSD03-SRC02-00000006679</a>	<b>THE MAVERICK GROUP INC</b>  <b>Prompt Pay Discount:</b> 5% 10 days, 4% 15 days, 3% 20 days, 2% 30	Jose M. Rodriguez 413-746-8868 <a href="mailto:documents@maverickgroup.com">documents@maverickgroup.com</a>	VC6000185672	8

	days	<a href="#">inc.net</a>		
<a href="#">PO-16-1080-OSD03-SRC02-00000006686</a>	<b>UNIVERSAL SHREDDING LLC</b>  <b>Prompt Pay Discount:</b> 2% 10 days, 1.5% 15 days, 1% 20 days	Steve Rando  978-882-1515  <a href="mailto:steve@universalshredding.com">steve@universalshredding.com</a>	VC0000449969	9
<a href="#">PO-16-1080-OSD03-SRC02-00000006682</a>	<b>WILLIAM B MEYER INCORPORATED</b>  <b>Prompt Pay Discount:</b> 1.5% 10 days, 1% 15 days, .5% 20 days  <b>On Line Capability:</b> yes	Mike Cavallo  203-668-5339  <a href="mailto:mcavallo@williambmeyer.com">mcavallo@williambmeyer.com</a>	VC0000192299	10
<a href="#">PO-16-1080-OSD03-SRC02-00000006697</a>	<b>Conversion Vendor</b> 1. All awarded vendors are listed under this PO - click on "Distributors" tab for list. 2. Use this MBPO when obtaining at least three (3) quotes. 3. Once a decision is made go directly to the PO assigned to the awarded vendor to place order.  <b>Additional attachments that apply to the contract award :</b> 4. Request for Response (RFR) Main Document, 5. Performance Specifications and Requirements 6. Contract User Guide 7. Statement of Work Template		n/a	n/a

## Strategic Sourcing Services Team Members

Keith Chudyk	Department of Public Health
Mary Beth Curley	Department of Public Health
Gerard DeFranc	Department of Children & Families
Robert Fortes	Division of Professional Licensure
Sarah Johnson	Consumer Affairs and Business Regulation
Brian Kearnan	Department of Correction
Edith Kwok	Executive Office of Education
Martin L. Lydon	Group Insurance Commission
Lori Maggiasco	Operational Services Division

Katherine Morse                      Operational Services Division  
Vadim Sealy                              Health and Human Services  
Sarah Wilkinson                      Division of Professional Licensure

## Summary of Where to Obtain Important Contract Information in COMMBUYS

This contract has been set up as a zero line item catalog in COMMBUYS.

There are currently 10 vendors on this contract and each vendor has been assigned a unique Master Blanket Purchase Order (PO). Vendor price lists are located in the attachments tab on each Master Blanket Purchase Order.

Each vendor has any or all of the following eight (8) catalog lines available depending on the vendors awarded category:

Category Name
Monthly Storage Services
Archiving Services
Retrievals Services
Transportation delivery/pick-up services
Emergency delivery/pick up services (retrieval capability 24/7-365 days)
Scanning Services
Destruction Services (including but not limited to records, tapes and other media)
Other available services as defined by the contractor

## How to Place an Order

Departments are required to solicit at least three (3) quotes from contractors listed to determine which contractor can provide the best value for the services being purchased. All that is required is that departments contact the three (3) contractors for quotes; you are not required to receive responses from all three (3) contacted contractors.

Once a quote is obtained and selected the ordering process is as follows:

### P.O. FOR ONE-TIME SERVICES

- Once a service and price is determined, the ordering process is as follows:
- Initiate a new requisition
- Search for an item (Use FAC96) in the description
- Select the vendor you will be placing an order with
- Select the appropriate catalog line
- Enter "1" in the Quantity field and the total price in the Unit Cost field
- Attach the vendor quote and/or a detailed order summary
- Submit for approval

### **P.O. FOR ONGOING SERVICES**

If the price is estimated for ongoing services (monthly storage, etc.), then you may enter a PO for the full amount of the estimate, as per the instructions above, and place partial receipts as you receive billing from the vendor. In such purchase orders insert the following language in the special instructions box of the PO: “ This Purchase Order represents the total estimated expenditure for this engagement (insert brief description), against which (identify department) will execute partial receipts in COMMBUYS upon receipt and approval of invoices, in order to record the work accomplished according to the agreed upon engagement terms. All estimated expenditures are subject to reconciliation based on invoices rendered for agreed-upon delivery of goods and/or services.”

Further direction is available in the [“How to Complete a Partial Receipt in COMMBUYS”](#) Job Aid.